Consumer-Directed Attendant Care (CDAC):

Toolkit

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Welcome to the Toolkit

This toolkit contains certain common forms designed to assist you and your Case Manager as you consider the Consumer-Directed Attendant Care (CDAC) program, as well as general information for functioning as a CDAC Employer, and working as an Employee/Attendant.

Employer and Employee tax and other necessary forms along with detailed instructions are located in the packets of information you will receive from the fiscal intermediary company once you have talked with your Case Manager about beginning the program.

By using the accompanying CDAC Program Guide and this Toolkit together, you should be able to complete and submit paperwork efficiently and timely, and maintain your records.

It is part of doing business.

Division of Aging Staff
Family and Social Services Administration (FSSA)
State of Indiana

Case Management Forms

Consumer-Directed Attendant Care Initial Checklist

The consumer affirms:

___ I am capable of performing the duties required of an employer.

___ I accept full responsibility for the direction of his personal care and managing the hours approved in the Plan of Care.

___ I am prepared to hire, train, supervise, and dismiss if necessary, employee(s) that will perform personal attendant duties for him.

___ I understand I will receive an enrollment packet from the fiscal intermediary and must complete all necessary paperwork required to become an employer.

___ I understand my employee(s) must also complete necessary paperwork provided by the fiscal intermediary before starting work.

___ I understand my employee(s) must submit proof of annual TB testing and a CPR certification before starting work.

___ I am aware that one personal attendant may not provide more than forty (40) hours of service in a one-week period; if over that amount of hours is required.

___ is aware that if he has a spend-down requirement, he is responsible for paying that amount to the fiscal intermediary, when required to do so in order to meet his spend-down amount.

___ I will inform the FI or CM of any changes of employment.

___ I have developed and submitted a *written* back-up plan. The back-up plan may include a second attendant.

___ I have identified emergency information which will be made available to his attendant.

___ I understand I am responsible for addressing any quality of care issues directly with the provider of my care.

___ I am aware of how to report abuse or fraud promptly to the specified authorities and to you as CM.

___ I am responsible for monitoring the attendant's daily task sheets and see they are available for inspection at any time by the CM.

___ I understand the time-reporting process for my employee(s) as well as the program's timekeeping procedures.

__ I am responsible for signing my employee's weekly timesheets, thereby affirming the hours are true and correct and services delivered, and am aware that falsification of these records is considered a criminal act and considered Medicaid fraud.

___ I understand that you as CM will be visiting with me at a minimum of every ninety (90) days and will file an incident report to the State to convey any quality of care issues or lapses in my responsibilities.

___ I understand that if these issues are not resolved in a timely manner, you as CM can revoke my eligibility to participate in the CDAC program.

___I understand I will be required to address incident report issues when investigated by the State. I further understand that failure to do so may result in his termination from the CDAC program.

___ I am aware of the fiscal intermediary's Customer Service Hotline and how to contact it.

___ I understand that as an employer, I assume certain risks such as bodily injury or property damage and I will define the duties of my employees in order to minimize such risk.

____ ___________________________

Signature Date
Consumer

I affirm that this Consumer has received information in fulfilling his or her responsibilities in the CDAC program, and *in my professional opinion*, has a fundamental understanding of how the program will work, and what his or her responsibilities will be.

____ ___________________________

Signature Date
Case Manager

Case Manager Initial Checklist

This form affirms that your client and/or his representative has received training in how to fulfill his or her responsibilities in the CDAC program, and *in your professional opinion*, has a fundamental understanding of how the program will work, and what his responsibilities will be.

The consumer:

___ is capable of performing the duties required of an employer.

___ accepts full responsibility for the direction of his personal care and managing the hours approved in the Service Plan.

___ is prepared to hire, train, supervise, and dismiss if necessary, employee(s) that will perform personal attendant duties for him.

___ understands he will receive an enrollment packet from the fiscal intermediary and must complete all necessary paperwork required to become an employer.

___ understands his employee(s) must also complete necessary paperwork provided by the fiscal intermediary before starting work.

___ understands his employee(s) must submit proof of annual TB testing and a CPR certification before starting work (and every two years thereafter).

___ is aware that one personal attendant may not provide more than forty (40) hours of service in a one-week period; if over that amount of hours are required, consumer may arrange for five (5) hours of assistance from a backup attendant.

___ is aware that if he has a spend-down requirement, he is responsible for paying that amount to the fiscal intermediary, when required to do so in order to meet his spend-down amount.

___ is aware he must inform the fiscal intermediary of any changes in ATTC employment.

___ has developed and submitted a *written* back-up plan.

___ has identified emergency information which will be made available to his attendant.

___ understands he is responsible for addressing any quality of care issues directly with the provider of that care.

___ is aware of how to report abuse or fraud promptly to the specified authorities and to you as CM.

___ is responsible for monitoring the attendant's daily task sheets and sees they are available for inspection at any time by the CM.

___ understands the time-reporting process for his employee(s) as well as the program’s timekeeping procedures.

__ is responsible for signing his attendant’s weekly timesheets, thereby affirming the hours are true and correct and services delivered, and is aware that falsification of these records is considered a criminal act and is considered Medicaid fraud.

___ understands that you as CM will be visiting with him at a minimum of every ninety (90) days and will file an incident report to the State to convey any quality of care issues or lapses in employer responsibilities.

___ understands that if these issues are not resolved in a timely manner, you as CM can revoke his eligibility to participate in the CDAC program.

___ understands he will be required to address incident report issues when investigated by the State. Consumer further understands that failure to do so may result in his termination from the CDAC program.

___ is aware of the fiscal intermediary’s Customer Service Hotline and how to contact it.

_______________________________________ _________________________

Signature Date
Case Manager

Case Manager 90-Day CDAC Checklist

___ Participant or his or her representative continues to be capable of performing the duties required of an employer.

___The number of hours of care the provider has delivered is in line with the plan of care.

___ No personal attendant has provided more than 40 hours of service in any given one-week period within the plan of care.

___ Participant or representative has submitted timesheets (if warranted) and completed all necessary paperwork as requested by the fiscal intermediary.

___ Participant or representative has hired, trained, and is actively supervising the personal attendant(s).

___ Participant or representative is able to address quality of care and/or performance issues with the personal attendant.

___ Provider is delivering all services appropriately as stated in the plan of care and as described in the Personal Attendant Responsibilities Worksheet.

___ Participant has a written backup plan. Backup provider is still available to provide care.

___ Emergency information is up to date and available to the personal attendant.

Case Manager's Certification

Based on the information provided to me by the participant or his or her representative listed below and his or her employee(s), I continue to believe that the participant, or his or her representative, is capable of participating in the Self-Directed Care Program and executing the responsibilities of employer per the guidelines set forth in the training manual. The participant is being provided with care as stated in the plan of care, and there are no concerns with the quality of care being delivered by the provider.

_______________________________________ ________________

Signature of Case Manager Date

_______________________________________ ________________

Signature of Participant or his or her Representative Date

Employer Forms

Individual Directing Care/Employer Training Checklist

As a participant in the Indiana Consumer-Directed Attendant Care (CDAC) program, or as Representative of a participant in the Indiana CDAC program, I, the undersigned, affirm that I have undergone training in how to fulfill my role in the program and presently have a good understanding of how the program will work and what my responsibilities will be:

___ I affirm I am capable of performing the duties required of an employer.

___ I accept full responsibility for direction of my own personal care, and manage the hours approved for my needs.

___ I will hire, train, supervise, and terminate (if needed) an employee who will perform the duties of my personal attendant.

___ I will complete all necessary paperwork required to become an employer.

___ I will ensure my Employee completes the necessary paperwork before starting work.

___ I will verify my Employee is reporting his or her time accurately and appropriately in accordance with the program's outlined timekeeping procedures.

___ I will assure my Employee is not eligible to work more than my budget authorizes and is never approved to work more than forty (40) hours in one week. I will arrange for service from another caregiver if I should require additional services.

___ I understand that if I have a spend-down requirement, I am responsible for paying this amount to the FI.

___ I understand that as an employer, I assume certain risks such as bodily injury or property damage and I will define the duties of my employees in order to minimize such risk.

___ I will inform the FI or my CM of any changes of employment.

___ I will develop a backup plan and provide it in writing to the FI and CM.

___ I will make emergency information available to my Employee(s).

___ I will be treated with dignity and respect, including respect of my privacy and confidentiality, and will extend this respect to my Employee(s).

___ I will report abuse or fraud promptly to the specified authorities and my CM.

___ I am aware of the FI's Customer Service Hotline and will contact it with any questions I may have concerning this program.

My signature below affirms I have read and understand these responsibilities and will do my best to perform them.

____ _______________________

Signature of CDAC Client or Representative Date

____

Printed Name

As the Case Manager of the above individual, I certify that this client, or his/her Representative, is fully capable of participating in the Consumer-Directed Care Program and executing the responsibilities of an employer according to the guidelines set forth in this training manual.

____ _______________________

Signature of Case Manager Date

____

Printed Name

Consumer-Directed Attendant Care (CDAC) Services Training

I hereby certify that I, (Consumer's name) ___________________________________, have provided proper training regarding my personal care needs to my caregiver, (CDAC Employee/Attendant name) ___________________________________.

It is my understanding that ATTCs are those basic and ancillary services, which the ATTC performs that enable me to live in my home and community instead of in an institution. Further, I understand that by providing this training on allowable activities to the ATTC, he or she will then be responsible for assisting me in carrying out the functions of everyday living, self-care, and mobility. I certify I have trained the ATTC on the following activities I require, and they are considered allowable activities under the definition of attendant care services.

<table>
<tr><th>Attendant Care</th><th>Nutrition</th></tr>
<tr><td rowspan="5">__ Bathing (tub/shower)
__ Partial bath, hands, face, back, private areas
__ Oral hygiene
__ Hair care
__ Shaving
__ Intact skin care
__ Clipping hair
__ Cosmetics application
__ Hand and foot care
__ Proper body mechanics
__ Transfer between bed and chair
__ Ambulation (not including assistive devices)</td><td>__ Meal planning, preparation, and clean-up</td></tr>
<tr><td></td></tr>
<tr><td>Elimination</td></tr>
<tr><td>__ Assisting with bedpan, beside commode, toilet
__ Incontinent or involuntary care
__ Emptying urine collection and colostomy bags</td></tr>
<tr><td>Other
__ Reminding client to self-administer medication
__ Reality orientation and sensory stimulation
__ Escorting client to medical appointments
__ Assistance with correspondence and bill payment</td></tr>
<tr><th>Health and Safety</th><th>Other Client-Specific Training</th></tr>
<tr><td>__ Use of the principles and health and safety in relation to self and client
__ Identify and eliminate safety hazards
__ Practice health protection and cleanliness by proper hand washing and waste disposal techniques.</td><td>____
____
____</td></tr>
</table>

Needs Inventory

As you think about hiring a personal attendant, it can be helpful to think through your wants, needs, and on what you can—and cannot—compromise. Spelling out your needs will help you make wise choices in hiring a quality personal attendant, while taking into consideration the allowable hours and activities set out in your Service Plan.

Knowing your own needs is one thing. However, communicating your needs clearly is another, and is a key skill when working with a privately employed attendant. Before you can do this, it is important to have your needs well-defined and in as much detail as possible. Writing these down will help you to be very specific about the different aspects of attendant care you need. Think about what things in your lifestyle are important to you that you want this person to be aware of and agreeable to in working with you. It may also be helpful to mention some of these things when you interview applicants, should you do so.

Personal Attendant Responsibilities Worksheet

The following "Personal Attendant Responsibilities Worksheet" is a tool Employers can use to determine which hours the attendants will work, on what tasks and on what days. This is an agreement between the individual and the attendant that sets expectations and limits, and should be agreed upon between the Employer and his Employee/Attendant(s). CMs can assist with this if necessary. The important thing about it is that the total number of hours cannot exceed the hours allowed in the plan of care. In no instance can the hours a single attendant works be more than 40 per week. The worksheet can also be used from time to time to check that tasks are being completed when they are needed, that none are being neglected, and that the attendant is meeting the individual's expectations.

Personal Responsibilities Worksheet

	Needs:	How Often (days a week/ times a day)?	How long does it take?	Preference of time of day (am/pm):	Notes (include preferences and other things):
ADLs	Bathing/Showering				
	Dressing				
	Grooming (shaving, hair care, make-up, oral care)				
	Meal Preparation				
	Eating				
	Bowel Care				
	Bladder Care				
	Turning in Bed				
	Transferring				
	Exercising				
	Other:				
		TOTAL:			
OTHERS	Writing Letters/Mail				
	Grocery Shopping				
	Computer Assistance				
	Making Bed				
	Driving (Van?)				
	Errands				
	Laundry/ Ironing				
	Housekeeping				
	Answer Phone				
	Reading				
	Others:				

General Policy

Indiana's CDAC fiscal intermediary (FI or Current Contractor) is responsible for establishing eligible consumers as Employers and enrolling service providers as Employees. Current Contractor provides payment to Employees, maintains all financial and Employer/Employee tax records, and provides reports concerning hours worked and payments made. Having Current Contractor handle these financial and other responsibilities enables Consumers or their Representatives to focus on hiring an Employee and begin receiving services.

For purposes of this manual, the term "Employer" shall have the same meaning as "Employer of Record" or "EoR." Establishing an individual directing care as an Employer recognizes that in certain circumstances an individual other than the individual directing care shall assume the duties of Employer. These occur when:

- An adult individual directing care and his or her family or informal support determines that another responsible person shall assume the role of Employer.
- The individual's affairs are managed by a guardian who has verified his or her status through submission of a copy of a judicial order.
- The individual directing care is already operating a business and is registered with the IRS as a Sole Proprietor.

Employer Enrollment Forms

The following forms are used in setting up your Employer account and are included in the Employer packet you will receive from Current Contractor, along with instructions. Please note it is in your best interest that you pay attention and **make sure all your forms are accurate and complete before returning them to Current Contractor.** Postponements can cause delays in beginning your services.

IRS Form SS-4. Application for Employer Identification Number - This federal form is a request to the Internal Revenue Service (IRS) to act as an employer. The IRS will assign you or your Representative an Employment Identification Number (EIN). An EIN is required in order to participate in the CDAC program.

IN Form BT-1. Indiana Business Tax Application - This state form is used to register you or your Representative as an employer with the Indiana Department of Revenue for tax withholding. The State of Indiana will assign you a state ID number for employment taxes. This does not mean you will have to calculate your employee's taxes—the FI will do that for you.

IRS Form 2678. Employer Appointment of Agent **-** This form tells the IRS that you give the FI permission to do work for you, such as allowing the FI to subtract or withhold taxes from your employee's paychecks. This form also allows the FI to deposit these taxes to the IRS.

IRS Form 2848. Application for Power of Attorney & Declaration of Representatives **-** This form lets the IRS know that you give the FI permission to sign quarterly and annual deposits of your employee's taxes. It also allows the FI to talk to the IRS through telephone calls or letters about any issues with your tax withholding only. **It does not give the FI any access to information regarding your personal income taxes**.

IN Form POA-1. Power of Attorney - This form lets the Indiana Department of Revenue (IDOR) know that you give the FI permission to sign quarterly and annual tax deposits of your employee's taxes. It also gives the FI permission to discuss your payroll account with the IDOR about tax withholding issues only. **It does not allow the FI to discuss your personal taxes**.

IRS Form 8821. Tax Information Authorization **-** This federal form authorizes the FI to speak with the IRS on your behalf regarding tax withholding issues only.

IN Form EFT-1. Authorization Agreement Fund for Electronic Funds Transfer - This form authorizes the FI to file and deposit taxes electronically.

Once employer forms are complete and sent back to the FI, it will perform a comprehensive review of the quality and accuracy of EoR forms received on behalf of prospective Employers. If corrections are required, the FI will notify the EoR of the errors, and return a clean copy for signature.

Accurately returned packets are processed with the appropriate tax authorities and are maintained in a secure location within the FI. In addition, electronic copies of the documents will be created and maintained in its Document Management System to enable remote access by properly authorized personnel only. Employer enrollment paperwork is kept on file at the FI's processing center**.**

Employee Enrollment Forms

The FI's welcome packet for Employees includes, but is not limited to, the following:

- An FI welcome letter, including the name of the Employer of Record, and the "Beginning Balance Statement."
- IRS Publication 797 – Possible Federal Tax Refund Due to the Earned Income Credit.
- Time Sheet.
- Time Sheet Instructions.
- Electronic Funds Transfer (EFT) instructions.

Following is a brief description of forms in the Employee Packet that must be signed and returned to the FI:

- *Employee Data Form*. This form was prepared by the FI to collect information about Employee background and emergency contact information.
- *FI's Checklist for Employees*.
- *Welcome aboard letter*. Includes FAQs.
- *CDAC Program Spend-down Policy*.
- *What you need to know about Incident Reporting.*
- *Information on Direct Deposit and Application.*
- *FAQs on Pay Cards.*
- *USCIS Form I-9*. US Citizenship and Immigration Service (USCIS) - Employment Eligibility Verification. This form tells the USCIS that the employee is eligible for employment in the United States. The employer must certify and sign Section 2 of the I-9 Form.
- *Employee-Employer Agreement*. This form is signed by both the Employer and Employee and identifies the agreed-upon start-time for employment, wage rate and authorized hours. It also includes an agreement by the Employee to submit to a limited criminal history check.
- *Attendant/Employee Training Checklist*.
- *Consumer and Employee Relationship Form*.
- *Current Contractor's Application for Tax Exemption Based on Age, Student Status, and Family Relationship*.
- *IRS W-4 Form*. Employee's Withholding Allowance Certificate. This form is used to calculate the employee's federal tax withholding.
- *IN Form WH-4*. Employee's Withholding Exemption and County Status Certificate. This form is used to calculate the Employee's state tax withholding.
- *Current Contractor's Current Annual Pay Period Schedule*

Employment Terms and Conditions

The following agreement is included here for your information. The actual one that you and your new personal attendant will sign will be included in the employment packet.

Employment Terms and Conditions Agreement
Letter of Acceptance

The following terms stated in the agreement apply to the following individuals (please print):

Name of Employer: ____

Name of Employee: ____

Name of Consumer: ____

Certain unemployment tax exemptions exist for employers who hire family members. Is there a family relationship between the Employee and Employer? If so, what is this relationship?
____

WHEREAS, the State of Indiana, Family and Social Services Administration (FSSA) has designated the Current Contractor as a Fiscal Intermediary (FI) to provide agent of the Employer services on behalf of the Employer stated above, which shall include processing paychecks, performing state and federal withholdings and reporting, and procuring unemployment insurance, and

WHEREAS, the Employer has selected the Employee to provide certain services and supports consistent *with the above-named Employer's Service Authorization*, and

WHEREAS, the Employer will 1) direct the Employee on how to deliver services, 2) utilize the consumer's FSSA funding allocation to support all aspects of the Employee's service, and 3) ensure compliance with the State of Indiana Consumer-Directed Attendant Care program rules.

THEREFORE, the Employer and Employee hereby agree as follows:

Offer: The Employer is pleased to offer the Employer a position to provide personal attendant services to the consumer. The Employer believes there is a good fit between the Employee's skills and interests, and the consumer's needs.

Start Date: _______/_______/_______. This date is contingent upon the Employee agreeing to a criminal background check and submitting the required documents to the Current Contractor. Once this information is received, Current Contractor will conduct the background check and report results to FSSA and the Employer.

Wage: $_______/hour. The Employee will be paid on a bi-weekly schedule after submission (electronically, U.S. mail, or fax) of timesheets to Current Contractor, agent of the Employer. A timesheet must be signed and dated by both the Employee and Employer to be valid. Current Contractor will withhold appropriate taxes and issue tax statements based on tax forms filed by the Employee and Employer, respectively.

Benefits: The Employee is *not* eligible to receive benefits under this agreement, or participate in any state pension or retirement plan.

Authorized Hours: The Employee is *not* eligible to work more hours than the Employer's service plan authorizes, and is *not* authorized to work more than forty (40) hours in one week.

Supervision: Continued employment will be determined by the FSSA, Division of Aging, and the Employer. Employment eligibility is based on satisfactory Employee performance, the Employee remaining in good standing with their criminal background, the Employer's needs, and the availability of State program funding for the consumer.

Confidentiality:
Upon receipt of information relating to the consumer, the Employee will become a holder of confidential data. The Employee agrees to use confidential data solely for carrying out his or her responsibilities under this agreement.

Indemnification:
The Employee agrees to indemnify and hold Current Contractor and Current Contractor's principals, agents, employees and subcontractors harmless for all claims, losses, expenses, fees, including attorney fees, costs and judgments that may be asserted against Current Contractor based on any acts or omissions of the Employee and/or Employer in carrying out their individual responsibilities under this agreement.

Accepted:

________________________________ ________________________________
Employer Signature/Date Employee Signature/Date

Send signed Agreement to current Contractor to Finalize Employment

Please return one signed copy of this agreement to the current Contractor and keep copies for the Employer and Employee records. Upon receipt by current Contractor, this agreement will be executed. An executed agreement will authorize current Contractor to issue paychecks to the Employee on behalf of the Employer using FSSA funds awarded to the Consumer.

Current Contractor, LLC
Fiscal Intermediary
P.O. Box 3767
Phoenix, AZ 85030-3767

xxx-xxx-xxxx Fax
xxx-xxx-xxxx Phone

Where to Get Help

Problem	Call
Abuse or Neglect	1) Adult Protective Services (APS) 1-800-992-6978 2) Your Case Manager
Tax questions Payroll questions Enrollment Questions Interviewing Developing a job description Hiring employees Training employees Payroll or fiscal emergencies	Current Contractor's Customer Service Attendant Center 1-800-_________________ 1-800-_________________ TTY Note: Current Contractor is the current fiscal intermediary (FI). In time, this may change. Consult your enrollment packet if the number above is not active.
Needed Change in Plan of Care	Your Case Manager
Medical Emergency	911 and your physician
Change back to agency care	Your Case Manager
Fraud	Office of the Attorney General 1-800-382-1039 Medicaid Fraud – 317-232-1217 or 1-800-457-4515

Fraud Referrals

Medicaid Member Fraud

One of the most important tools the State has in its program to enforce appropriate use of Medicaid services is the Restricted Card lock-in program. This program relies on provider awareness and reporting of member habits. When you refer members who exhibit behaviors associated with inappropriate Medicaid use, you can help prevent or correct system abuse.

Please report members who engage in any of the following activities to Health Care Excel, (HCE), the State's Surveillance and Utilization Review (SUR) contractor, (317)-347-4527 (local) or 1-800-457-4515.

- Drug-seeking behavior.
- Frequent, inappropriate use of the emergency room.
- Duplication of services by multiple providers or practices of the same specialty.
- Frequent changes of primary care physician.

In addition to reports from physicians, pharmacies, and emergency room practices, HCE accepts referrals from county caseworkers, law enforcement officials, other privately concerned individuals, and anonymous sources. All individuals are encouraged to report potential member fraud or abuse to HCE.

Medicaid Provider Fraud

Medicaid provider fraud occurs when a healthcare provider such as a doctor, dentist, pharmacist, hospital, nursing home, personal care agency, a CDAC Employee/Attendant, or other healthcare provider:

- Bills Medicaid for services the Medicaid recipient does not receive;
- Bills excessively for services; or
- Bills for unnecessary services.

Call the **Attorney General's Medicaid Fraud Control Unit** if you have evidence of, or suspect a healthcare provider is committing Medicaid fraud: 1-800-382-1217.

Reporting all Fraud

If you are uncertain or uncomfortable with the established method of reporting, you may contact the FSSA Office of Audit Services at 317-232-1217.

Employee Training Checklist

As an Employee of the Consumer-Directed Attendant Care program, I, the undersigned, affirm I have received training in how to fulfill my role in the program and am presently in good understanding of how the program will work and what my responsibilities will be:

___ I will complete all necessary paperwork required to become an Employee.

___ I will report my time accurately and appropriately in accordance with the program's out-lined timekeeping procedures.

___ I understand that I am providing services to my Employer in the home. If he or she becomes hospitalized, admitted to a nursing facility, or is otherwise not available, I will not be paid through the waiver for services I provide during that time.

___ I understand that Worker's Compensation insurance will not be provided by my Employer, the fiscal intermediary, or the State of Indiana, and I am responsible for my own negligent acts. As such, I will not take on responsibility for services outside the range of my job description, specifically medically-related services.

___ I will be treated with dignity and respect, which includes respect of my privacy and confidentiality, and I will extend this respect to my Employer.

___ I will report abuse or fraud promptly to the specified authorities.

My signature below affirms I have read and understand these responsibilities and will do my best to discharge them.

____ _________________________

Signature of Employee Date

____

Printed Name

An Overview of the Hiring Process Checklist

Step One – Meet with your Employer to complete forms:

___ USCIS Form I-9 (must be completed by you; Section 2 must be signed by your Employer)

___ Employment Terms and Conditions

Step Two – Mail forms to the FI

___ USCIS Form I-9, US Citizenship and Immigration Services

___ IRS W-4 Form, Employee's Withholding Allowance Certificate

___ Form WH-4, Employee's Withholding Exemption and County Status Certificate

___ Employment Terms and Conditions

___ Employee Data Form

All forms must be signed and returned to the FI prior to your approval to become eligible as an Employee, and the Service Plan must be approved before you may submit timesheets. If you have any questions, please call the FI.

Job Description

The purpose of this section is to help you with your thinking about exactly what your expectations for a personal attendant are. It will help you to draw up a written agreement with your personal attendant that will spell out exactly what you expect and exactly what your personal attendant may and may not be asked to do. When you think about creating a job and finding someone to do it, you will have to think about competencies and performance expectations.

The information below about these two important considerations may be helpful to you as you draw up a complete written job description.

About Competencies

Competencies are qualities or skills you want your personal attendant to have. Different qualities are important to different people. A sample list of competencies and performance expectations is provided for you to review as you consider potential personal attendants. What qualities and skills are important to you? You decide what is most important to you based on your personality, the tasks you need done, and how often you are going to have contact with your personal attendant. You may want to include a list of competencies in your job description so your personal attendant will know exactly what qualities you expect him or her to have.

Along with the sample list of competencies, we have provided detailed definitions of performance expectations based on the competencies. These lists are not all inclusive as everyone's individual needs are different. We hope they will serve as a guide to help you as you begin to think about your needs, develop your personal attendant job description and train your personal attendant.

Designing Your Job Description

An important step in designing your personal attendant's job description will be to complete the self-assessment. It will help you choose the qualities and skills you want in a personal attendant based on your wants and needs. You can also choose a schedule that works best for you and the number of hours you want the personal attendant or attendants to work. Once you have done this, you are ready to design your personal attendant's job description. There is a sample job description included that you can use, or it may be used as a guide if you want to create your own.

Why You Should Have a Job Description/Personal Attendant Provider Agreement

A Job Description/Personal Attendant Provider Agreement is necessary to protect you and your personal attendant(s). With an agreement in place, there can be no confusion or discrepancy about job expectations. The employer cannot expect the personal attendant to do tasks not agreed to in the job description and the personal attendant cannot disregard responsibilities listed in the job description.

In order for the Job Description/Personal Attendant Provider Agreement to be effective, it is important that:

• You are specific when writing the job description.

• You and your personal attendant(s) completely read and sign the Agreement.

• Both of you keep a signed copy for your own records.

• Both you and your personal attendant(s) know your roles and responsibilities.

The following competencies may or may not be of importance to you, but all are worth considering.

Competencies

Work Commitment – Willingly expends extra effort and time to get a job done. Identifies with employer's goals, and exhibits good time management skills.

Building Relationships -- Able to establish a rapport with employer and respect his or her wishes.

Communication Skills -- Able to talk openly and honestly about all aspects of employer's care and needs. Able to understand instructions. Able to communicate with employer in the way employer likes to and is able to communicate.

Teachable -- Willing to be trained.

Action Orientation -- Takes direction from employer and is able to follow instructions.

Problem Solving -- Able to assess needs within agreed upon duties and consider course of action best to meet those needs.

Caregiving -- Able to complete all personal care tasks needed by employer including but not limited to: bathing, toileting, feeding, dressing.

Physical Strength/Coordination -- Able to meet all physical needs of employer, including but not limited to: transferring, wheelchair maneuvering, possible lifting/moving of equipment.

Housekeeping -- Able to keep employer's area/home clean, orderly and sanitary.

Cooking -- Able to plan and prepare meals as directed by employer.

Driving -- Has dependable transportation, valid driver's license, and current car insurance. Able to drive employer if/when necessary as directed by employer.

Personal Appearance -- Dresses neatly and is well-groomed. Does not report to work looking messy or unclean. If accompanying employer in the community, dresses appropriately.

Time Management -- Able to complete tasks assigned by employer effectively, efficiently, and on time.

Safety Awareness -- Puts health and safety of employer first. Able to identify factors in employer's environment that may be harmful to employer and practices good judgment in avoiding/preventing harm to employer.

Crisis Management -- Able to remain calm in an emergency situation. Able to remember and follow emergency policy and procedures.

Punctuality -- Shows up for work on time. Stays for entire shift. Does not work overtime unless authorized by employer.

Scheduling/Reporting -- Considerate of employer's scheduling needs. Mindful to call-in when unable to report to work with advance notice or as soon as possible, if personal emergency occurs.

Record Keeping -- Keeps neat, organized and appropriate records. Maintains all necessary documentation including but not limited to work schedule, time sheets, daily log, and employer's calendar of appointments if necessary.

Discreet -- Always mindful of employer's privacy. Able to maintain confidentiality in all areas of information learned in regards to employer's life, needs, care.

Compassion -- Able to be sensitive to employer's needs, dignity, and desires while providing professional level of care.

Respect -- Able to respect employer as employer. Does not begin to assume a more controlling role in employer's life but rather understands and functions as employee.

Pre-Employment Checklist

You may already have someone in mind for your personal attendant, or you may want to get a list of personal attendants in your area from the provider registry maintained by the fiscal intermediary (your case manager can help you with this). If you want to look for a personal attendant in your community, the following checklist may be helpful.

- Complete training and sign off on training certification checklist.
- Complete the application packet from the fiscal intermediary.
- Advertise for a personal attendant.
- Review applications and resumes.
- Pre-screen applicants over phone.
- Select applicants to interview.
- Schedule face-to-face interviews.

- Narrow down choices of qualified applicants to 2-3.
- Check references and qualifications of 2-3 applicants.
- Select and hire the most qualified applicant.
- Direct applicant to review training materials and sign off on training certification checklist.
- Complete "New Hire" employment paperwork.
- Use "Job Description" as part of your new personal attendant's training.
- Complete the job responsibilities worksheet with the personal attendant.

Employee Checklist

- Remind the applicant that the following items may be required.
- Check all that apply. If any of the items do not apply to you, mark N/A:
- Employee application in the packet from the fiscal intermediary.
- Provider agreement & responsibilities worksheet.
- Employment forms provided by the fiscal intermediary (tax forms, etc.).
- Training checklist.
- Copy of Proof of Auto Insurance (if applicable).
- Emergency policy and procedures.
- Performance evaluation policy and procedures.
- References – three, professional or personal.
- Areas needing more specific training. Please list below:
- ____
- ____
- Complete enrollment packet.
- Complete checklist with case manager.

- The Hiring Process

Many people find their Employees/Attendants by telling their families, friends, neighbors, church members, or work associates they are looking for someone to hire. This informal way of finding an Employee often makes both parties more comfortable because you may already know the individual. If you are, or have been using agency-based care, do not assume you can hire your current (or former) attendant without checking. Many agencies have non-compete policies which would prevent you from hiring them for at least a length of time.

Pre-Employment Checklist

You might have someone in mind to hire for your employee/attendant, you may want to look for an attendant in your community. When you are thinking about where and how to advertise for your personal attendant, consider the community you live in. You may be able to create an advertisement on a flyer or large index card and have luck placing it at your local employment offices, grocery stores, churches, community colleges and/or social service agencies. Call these places first, get a contact name and ask about their policies or rules for community advertising.

If you feel the local newspaper will be the best route for you, call its classifieds department and speak with its representative about placing your ad in their employment section. Be sure to ask about prices, the best times to run your ad and how they will bill you for the ad. Find out what payment options it offers. Talk with the contact person about your ad to try to keep the cost down since some newspapers can be more expensive than others. Asking questions will keep you well-informed so you can make the best and most cost-effective choice for yourself.

When preparing your ad think carefully about the information you will include. Do not include your home address. Talk with your newspaper contact about the possibility and cost of using a box number through it, or you may want to consider a short-term post office box rental. You may also want to consider using the phone number of a friend or family member. This will help you pre-screen the calls and make sure anyone who has the wrong intentions does not get through to you. If you have a friend or family member willing to take and relay messages for you, you may want to discuss this option with that person. Your newspaper contact will be a good resource for what to include, what to leave out, and what newspapers have learned works best for people.

What to Include in an Advertisement

Things that make the job appealing

- Attractive/ flexible hours • Great location
- Rewarding work • Interesting person to work with
- Benefits

Important information to include:

- Hours of work • Pay
- General location • Phone number to call or P.O. Box (Do not give out your home address!)

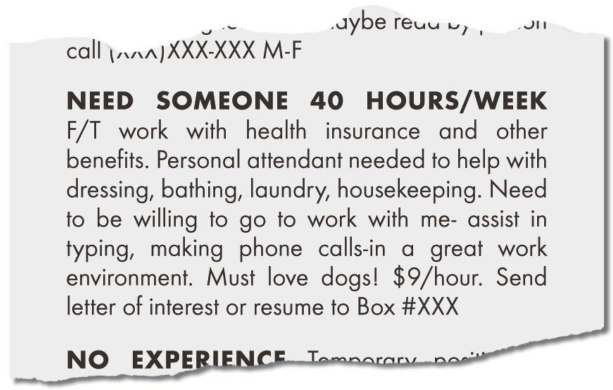
We have included some suggestions and the following sample ads for you to look at as you prepare to create your own advertisement:

Full-time personal attendant needed to provide services for an individual with a disability. Assist with personal care, grocery shopping, housekeeping. $$/monthly [or hourly] salary. Time off arranged. Call ______________________.

Part-time personal attendant needed for an individual with a disability, 8-12 am weekdays. Help with personal care, grocery shopping, housekeeping. Call ____________________.

Young individual with a physical disability needs overnight part-time personal attendant to maintain independent living. Modern 2-bedroom apt, centrally located. Call ______________________ after 9:30 AM.

Sample ads might look like this:



Using an Application

Regulations indicate that the employee must submit a personal resume/application concerning the individual's qualifications, work experience, and any credentials the individual may hold. If you use an application, it gives you a chance to get on paper information to look at later. This will allow you to spend more time talking with the person and getting a feel for his or her personality. The application which follows can be used as a template if you want to create your own but the application/resume must identify past work experience and any credentials that the individual my hold.

Also, it gives the potential personal attendant the idea that this really is a job and it needs to be taken seriously. It will show the potential personal attendant that you are organized and in control of your situation. It may assist in screening out applicants who did not realize the details that go into this kind of job.

It may also discourage those with questionable motives when they realize you have some standards and expectations that need to be met. It can prevent abuse from the beginning by letting the applicant know you are aware of the potential for that type of situation; and that you are on the lookout for it and will not tolerate it.

Pre-Screening for Interviews

Using the telephone to speak with applicants for the first time is a good way to pre-screen them. This will help you to eliminate applicants who do not meet your criteria. You may want to use the Personal Preference Assessment included in this guide to help you target exactly what you are looking for in a personal attendant.

> **Note:** Some questions are illegal to ask during the interview process. Read the "Questions You Cannot Ask in an Interview" page so you will know which questions are illegal or discriminatory.

Guidelines for Telephone Screening

- Act quickly.
- Call people back as soon as possible. Good people find jobs quickly.
- Be pleasant.
- This is common sense, and but it bears repeating: Be friendly and pleasant on the phone.
- Provide some basic information about the job.
- Write a list of job tasks so that you are giving the same information to every applicant.
- Let them know the needed number of hours and days along with the hourly wage and start date.
- Tell people if you smoke or have pets, as this may eliminate some applicants.
- After giving them the basics, ask them if this sounds like the kind of job they would be interested in. If an applicant does not think this is the right job for them, this is a good time for them to say so. This is when you both can politely hang-up without wasting too much time.

Ask a few questions of the potential Personal Attendants:

- Why are you interested in this kind of work?
- What experience or training do you have?
- Do you smoke?
    - If lifting and transferring are essential functions of this job, is there any reason you would not be able to do those tasks?
- Occasionally, I might need you to work more hours. Can you do that?

Be organized

- Take notes. Write down the names and phone numbers of everyone you talk to. You can set-up a personal interview for good candidates when you talk with them, or you can call them back, after you have time to review all of your phone calls.

If, at the end of your telephone screening, you think you would like to interview this person face-to-face, you can make those arrangements while you still have the person on the phone. If you are not sure, you can politely end the conversation by saying "Thank you for your time. I will be making my final selections by (date) and will notify my top choices on that day to set-up another interview. Thank you again, good-bye."

Once you have decided to interview someone face-to-face, set a day and time and give the person directions to your house. If you prefer not to interview at your house, negotiate a reasonable meeting place. Be sure you have each other's phone number in case one of you needs to change the interview.

Things to Look Out For…

Some telephone responses are a warning of trouble. You may want to become alerted if:

- You specifically state you want a female assistant, but a male calls in answer to your advertisement, supposedly for a female friend or wife. Do not answer any personal questions. Ask him to have his friend or wife call you herself.

- Someone calling to lay their desperate situation on you, they have to get a job and/or place to live right away. Stick to your written plan of pre-screening applicants.

- Someone asking for your home address before you are sure you want to meet the person face-to-face. Use caution; remain in control of the situation.

You may want to consider having a friend or relative with you for support if you feel you may be nervous or anxious during this time.

What if You Don't Want to Interview Someone?

You are not obligated to interview anyone. Let each person know you are taking names and phone numbers and will call them back if you decide to interview them. You may find that you would like to interview someone later, even though your initial reaction was not to. Taking everyone's name and address will ensure you can get back in touch with people if you change your mind.

Interviewing Face-to-face

The face-to-face interview gives you the opportunity to learn as much as you can about the person who is applying for the job. It also gives the applicant information about the job requirements so that both of you can make a good decision. This works best if you are prepared.

Guidelines for Interviewing Face-to-face

Be safe

- Hold the interview in a location that is safe for you. Your local church, apartment building, or community library may have rooms available for you to conduct interviews if you do not want to use your home.
- You can invite a friend to sit in. In addition to safety concerns, having a second person is a good idea because that person may notice things during the interview that you do not.

Setting the tone of the interview

- First impressions are important. Convey a sense that you are a capable individual able to direct your own care.
- If you have a friend present, make sure it is clear that you are the interviewer.
- Think about the location of the interview. A living room is a better choice than the bedroom, which conveys a somewhat dependent picture.
- Wear clothes that convey confidence. Do not wear sleepwear.
- Sit facing the applicant so that you can observe eye contact and body language.
- Eliminate distractions. Turn the TV and radio off. Make sure pets and children will not interrupt.

What if you are nervous?

- Recognize that it is natural to feel nervous when interviewing.
- The prospective personal attendant is probably nervous too.
- Breathing deeply is the quickest way to relieve anxiety.
- Being prepared for the interview will also lower your anxiety level.
- Having a friend or family member with you may help calm your nerves.

Be prepared. Before the interview, make sure you have:

- A blank application form.
- A job description.
- A checklist (if you are using one) of duties for the shift(s) you are hiring.
- Information about your disability.
- Information about special equipment you use.
- A way to record your impressions (write them yourself, have a tape recorder, or ask a friend to act as recorder).

• A list of the interview questions you will ask (see list of suggested questions in this guide).

Planning the interview questions

- Decide ahead of time what questions you will ask, and write them down.
- Frame your interview questions to give you the information you need. (At the very least, you want someone who is trustworthy, reliable and responsible. Ask questions that will give you that information.)
- By using the same list of questions for each applicant, you will be able to compare their responses more easily.
- Do not ask illegal questions. (See the "Questions You Cannot Ask in an Interview" page.)

When the Applicant Arrives

Check him or her out carefully. Does the person look neat, clean and presentable? Does he or she seem comfortable around you? Do you feel comfortable around them? Find out as much as you can about them. You will be hiring someone to care for your needs. Some of this may be very intimate and personal. You will be making a decision to hire someone based on just a few contacts. Make the interview matter. Your health and safety is dependent upon the choice you make.

Make the applicant feel comfortable. You can ask, "Did you have any trouble finding the house?" A discussion about the weather is always safe and helps people relax.

Have the applicant fill out the application. Then give him/her the job description to look over. This will give you time to review the application. Pay attention to:

- Past experience.
- How does it look? Is it neat?
- How specific is it?
- Are all the bases covered? (Does it include work experience and education?)
- What are the employment patterns? (Are there frequent job changes?)

Red Flags on the Application

- Gaps in employment (any time period of over one month -- ask for more details).
- Omissions (educational, former employers -- ask for details).
- Inconsistency (dates do not make sense -- ask for details). If you have questions about any of the information on the application, the interview is the place to ask them.
- Explain your disability, as far as you feel comfortable. Give information that would be important for someone to understand if he or she were helping you.
- Review the duties on the job description and checklist.

• Ask the interview questions.

• Have a method for recording responses.

After you have completed your questions, ask applicants whether they have any questions. A lot can be learned about their grasp of your needs by their questions.

Things to Look Out For…

An applicant who:

• Has alcohol on his or her breath.

• Has greasy hair and dirty fingernails.

• Is rude.

• Is late.

• Discloses confidential information about previous employer.

• Takes control of the interview.

• Expresses sympathy, being overly considerate or hypersensitive.

• Stares or makes prolonged eye contact, which could be a sign of aggression.

• Makes little eye contact, which could be a sign of evasiveness. (Keep in mind it might also mean the person is shy or from a culture that finds too much eye contact disrespectful.)

Begins the interview by telling you all the things he or she cannot do or all the times he or she cannot work.

• Has no references. (Even someone who just moved here should have friends or previous employers elsewhere.)

• Says he or she just really needs a job and will take anything for now.

• Looks to the non-disabled person in the room for instructions and verification.

Be Sure to Discuss

• Duties and responsibilities of the job.

• Specific hours and days of work.

• Rate of pay, method and time of payment.

• Arranged time off.

• How the personal attendant will be trained.

- How his or her performance will be evaluated.
- How complaints/concerns will be handled.
- How much notice is expected from the personal attendant and employer for termination of services.
- Whether the working relationship will be formal or informal.

Avoid Interviewing Mistakes

- Do not talk too much. The more the applicant is able to talk to you, the more you can learn about them.
- Do not fail to follow-up with related questions. For example, if the applicant tells you they have had training, ask for more details. Where did they get this training and how long did the training last? What did they learn from the training that can be applied to this job?

Sample Interview Questions

Below are some sample questions. Select the ones you want to ask and try to think of any questions not on this list that could fit your particular situation.

- Do you have reliable transportation to and from work?
- Do you have any experience helping someone with a disability? Give me some examples.
- What are your attitudes towards disabilities?
- What do you like best and least about the work you have done in the past?
- Are you available for additional hours? How much notice would you need if I need extra help?
- Would you be able to help to transfer me?
- Are you able to think quickly on your feet? Give me some examples.
- How do you handle differences of opinion with an employer? Can you give me an example?
- How do you handle constructive criticism? Give me an example if possible.
- How do you deal with another person's anger or frustration?
- Do you feel comfortable bathing someone?
- Do you feel comfortable assisting with bowel or bladder routines?
- I need a driver with a clean driving record. Will there be any problems when my insurance company runs your driving record?
- Can you drive a vehicle with a stick shift?

- Do you have experience with driving a full sized van with a high top?
- Do you have experience with city or long distance driving?
- Are you available for out of town travel? Would your schedule allow you to stay somewhere overnight? How much advance notice would you need?
- Describe your best qualities.
- Describe your worst qualities.
- Do you prefer/require lots of supervision, or just a task list?
- Have you ever been fired from a job? If so, why?
- Do you have any questions/concerns about the job?

Questions You Cannot Ask in an Interview

- How old are you?
- What is your native language?
- What is your marital status?
- Do you have any children?
- Have you ever been arrested?
- Do you belong to any religious affiliations?
- Do you belong to any clubs or organizations?
- What is your credit rating?
- Do you own or rent your home?
- Do you own a car?
- What country were you born in?
- Do you have any addictions?
- What is your star sign?
- Do you have a disability or medical condition?
- What is your political affiliation?
- What are your family members' names?
- What is your race?
- Where are your family members employed?

Narrowing Down the Candidates

Once you have completed all your interviews you will be ready to choose your top candidates. Review the answers the applicants gave you to the interview questions along with any personal notes you may have made to yourself. If you had a friend or family member with you during the interviews, compare notes with him or her.

After you have considered everything and made your top choice(s), you are prepared to call and offer him or her the position if his or her references check out. You may want to keep a list of names and numbers of your other top choices and ask them if they would be willing to work as back-up in the absence of your personal attendant. This list could also be useful if your personal attendant does not work out for some reason. You could refer to it for a replacement personal attendant.

The next section of this guide will provide you with information on background and reference checks.

Checking References

You should always check references of someone you are planning to hire, **even if you think you know the person well**. You can either call or write for a reference. You may find it easier to call, although many employers require a written request with a signed release of information by the applicant. Even with a signed agreement, many employers will tell you only the dates a person worked for them. Personal references, on the other hand, are often willing to talk to you on the phone, and will often provide detailed information. Be sure to get references from appropriate people. Talking with someone's spouse, parent, or best friend is not a good practice. It is best if you talk to the applicant's

- Employers; current and/or past
- Supervisor
- Co-worker
- Teacher

A sample reference form is provided in the Toolkit of Forms. The form can be used for either a telephone or a mail reference check. Since there may be questions you want to add, looking this form over can help you create your own custom form.

If an applicant has asked you not to contact his or her current employer, please respect this, as the employer may not know about the interview.

Once you have checked references for all of the applicants, you should compare this information with the information you received from the applicant. Look for any differences in the information they give you. If a reference states a reason why the applicant can or cannot do this job, consider this information. Remember to trust your own initial instincts as well. Refer to the notes you made to yourself during the interviews so you won't forget the impression each person made on you.

Drug Screening

Drug screening is something you may want to consider for your potential personal attendant. This is not mandatory, but use of illegal drugs by your personal attendant could potentially be a risk to your health and safety. You will want to mention it in the interview if you plan to require a drug test for your potential personal attendant.

Drug screening is not a service provided by Medicaid. You will be responsible for any costs involved if you choose to ask for it.

If you choose to have your personal attendant screened for drugs, there are a few options for you.

- You can go on the internet and get drug-screening kits delivered to your home. The cost is a wide range starting at about $5. The more drugs you want to test for and the more kits you want, the more expensive it will be. If you use these home tests, remember you will have to administer the test yourself. Be sure you are comfortable with having to do that.
- You can request that the personal attendant go to a local lab for the drug screening. The lab will do the collection and testing for you. The cost from a medical lab is approximately $15-$35 depending on the extent of testing you want done. A private lab will cost approximately $35- $55 depending on the extent of testing you want done. This is not covered by the Medicaid program.

Making the Offer

Once you have made your decision, call and offer the job to the person you have decided you want working for you. Be prepared ahead of time for upcoming tasks you must complete. You will need to meet with your Employee/Attendant to complete additional paperwork, which is provided by Current Contractor The forms may change from time to time, so use the ones found in the packet sent to you by Current Contractor.

- W-4 form, Employee's Withholding Allowance Certificate for Federal taxes.
- I-9 form, Employment Eligibility Verification, with copies of two forms of ID, to show U.S. Citizenship or non-citizen authorized to be in the U.S.
- State of Indiana Employee's Withholding Exemption and County Status Certificate (WH-4).
- Indiana New Hire Reporting Form.
- Permission page for criminal background check.
- Job Description – The job description is an agreement between you and the personal attendant that explains the job expectations. You will both need to sign the signature page.

• Terms and Conditions form (in the packet).

If you have chosen to request drug screening, this is the time to do this. Make sure your personal attendant knows that if anything questionable comes back on the drug screening report, you have the option to terminate his or her employment immediately.

Employee/Attendant Training

Communication Tips for Successful Training

- Begin by explaining your disability as much as you feel is necessary.
- Explain any technical/medical words you use. Be as clear as you can.
- Be sure to emphasize anything relating to safety or emergencies.
- When giving instructions involving a procedure such as transferring, include each step as you go – describe why it is important to you that something be done a certain way.
- Do not take for granted that the person knows what you mean. Ask for him or her to explain it back to you.
- Be patient. Your Employee/Attendant will not get everything right the first or even second time.
- Try to be aware of your Employee's feelings as you train – put yourself in his or her shoes.
- Use others to help train, i.e., previous Employees, options available through home health or other agencies, and family members. Your CM and local AAA can provide information to you about other resources available for training. Please note that fees for additional training are not paid for by Medicaid. You or your Employee must cover any training costs.
- When your Employee has been trained, have him or her sign off on having received training via manual or electronic means (CD, website, etc.).

Training - Getting Started

Begin after your Employee/Attendant has reviewed the section of this manual for Employees. At first, it may seem awkward to train someone to assist you, but in time, it will become natural. Remember, you are the best person to train your Employee/Attendant! Who cares more than you do about your needs and knows better than you what works best? You probably have more experience in training others than you realize. You may have instructed family members, friends, or other staff in how to meet your needs, but now you have your own tools (job description, checklists, guidelines—see the Toolkit of Forms) to help you as you train.

It is best to begin training a new Employee/Attendant when there are not timelines to meet. Plan enough time so both of you can be as relaxed as possible without the pressure of having to rush. Take your time and talk openly with your Employee/Attendant so you will both be comfortable. Try to have patience and keep your sense of humor!

Choose Your Training Method

If possible, you may want to have an Employee/Attendant you already use or have used be a part of the training. It can be helpful to watch how you like things done. Even if it is a family member or friend who helps you, see if they are willing to help show your new Employee/Attendant how the two of you do things, and what works best. Of course, you may prefer it be just the two of you. If you feel this is the easiest way to train, then that's how it should be. Choose the method that works best for you.

Communication

Getting a sense of yourself as an Employer/EoR may be hard at first. You are responsible for making decisions about your personal care. Never assume your Employee/Attendant knows what you mean or what you need. Be direct, assertive, and set boundaries. Setting boundaries will help you establish your role as well as your Employee/Attendant's role. This will give both of you a better sense of the Employer/Employee relationship. Talk often about what you and the Employee/Attendant expect from each other.

When you begin the actual process of training your Employee, remember to be patient. He or she may not get everything the first or even the second time. It is important for you to be direct, and continue instructing until you both feel secure. Personal care tasks, such as bathing, dressing, and toileting can be embarrassing at first. We all have to deal with these issues on a daily basis. Be honest and straightforward, and keep that sense of humor. Using a written checklist might help.

Do not forget to give positive feedback for a job well done!

Acceptable Behavior:

- Employee/Attendant performing duties as agreed upon in the job description.
- Treating the Employer as an adult and as an Employer.
- Being dependable and on time. If that is not possible, call and let your Employer know.
- Showing respect and proper care of personal property.

- Having the social conduct and behavior agreed upon in the job description.
- Honesty in all aspects of the work.
- Sharing kindness, consideration, and patience.
- Being flexible in times of unexpected events.
- Having a good attitude about disability and aging.
- Allowing each other to discuss problems without feeling threatened or being judged.
- Maintaining an attitude of learning.

Unacceptable Behavior

- Being undependable and making unreasonable excuses for being late or not calling.
- Being physically or verbally abusive.
- Being dishonest, lying, stealing time and money, or damaging property.
- Gossiping and not keeping Employer's confidences.
- Showing unwillingness to perform tasks.
- Demonstrating unacceptable social behavior and performing activities not agreed upon in the job description.
- Not allowing the Employer to be in charge.
- Leaving or terminating the position without advance notice.

Employee Performance Expectations

All Employees are expected to demonstrate and maintain good character, and perform tasks allowed under the CDAC program. The following attributes may be considered during the hiring process and for continued employment. Your employment can be terminated at your Employer's discretion.

Attitude

Work Commitment – Leave the effects of any personal problems at home and report to work in good spirits ready to provide quality care. Must be willing to put forth every effort to do a good job in meeting the needs of Employer as directed.

Building Positive Working Relationships – Work to develop and maintain a friendly and ***professional*** rapport with Employee.

Teachable – Be willing to be trained and learn from Employer his or her preferred methods of care provision. Training may be ongoing and possibly change over the course of time as the needs of the Employer change. Be flexible and open to adjustments.

Compassion – Be sensitive to the needs and feelings of Employer, and maintain a professional and caring manner at all times.

Respect – Always use proper manners when speaking to, and working with, your Employer. Whether in the home or out in the community, Employee will show respect to the Employer by the way in which you speak, act, and provide assistance.

Time Management – Complete all jobs on time while maintaining quality of care. To avoid creating a stressful environment, discuss any situations with your Employer.

Work Schedule

Punctuality – Report to work on time and ready to begin.

Schedule/Reporting – Be considerate of your Employer's scheduling needs and call in advance or as soon as possible if unable to make it to work or you will be late. ***If you need to schedule regular or expected time off, it is considerate that you do so at least two weeks prior to the date(s) requested***.

Recordkeeping – Maintain timesheets, daily log documentation, Employer's calendar of appointments if necessary, and your work schedule. All documents must be neatly kept and organized in a space designated by the Employer.

Confidentiality – ***Do not share any information learned about your Employer with any person or agency without the Employer's expressed written consent***. This includes, but is not limited to the following: medical history and condition, personal preferences, personal care needs, family information, personal finances, and appointments.

Communication – You should be able to communicate with your Employer on the most basic level—his preferred use of language (e.g., language spoken, sign language, communication device, etc.). Be open and honest at all times and able to discuss issues that may be uncomfortable. Be willing to accept direction from your Employer and follow that direction. Be able to accept suggestions as directed by your Employer.

Crisis Management

Problem Solving – Be able to assess needs within agreed upon duties and present reasonable solutions or a course of action for meeting those needs. Remain calm, and rationally look at situations.

Emergency Care – Have the ability to remain calm and provide immediate care to your Employer in order to insure his health and safety, and prevent further danger or injury. Contact emergency services in order to resolve the situation (e.g., police, ambulance, fire department), and follow the emergency procedures outlined by your Employer during your training.

Incident Reporting -- It is the policy of the Division of Aging (DA) to ensure the health, safety, and welfare of ALL individuals receiving services administered through the DA. The policy was established to identify and address the immediate and potential risk to the health, safety, and welfare of individuals receiving services.

Job Duties

Personal Care – Complete all aspects of personal care in regards to bathing, shaving, dressing, toileting, oral hygiene, transferring, and sleep schedule, as directed by your Employer.

Housekeeping – Complete all housekeeping tasks including providing help with grocery and personal shopping, meal preparation, eating, laundry, and cleaning or housekeeping as directed by your Employer.

Cleanliness – Practice good personal hygiene before reporting to work. It is important that you be clean and neat. Wear your hair in a manner that it will not get in your face or in food, or your Employer's face. Do not wear perfumes or colognes.

Community – Meet your Employer's needs in the community that may include such activities as help with banking, participation in recreational or leisure activities, community access, religious activities, job activities, and other approved types of transportation.

Specific tasks must be outlined in your job description and agreed upon by both you and your Employer.

Working as an Attendant

Communication

The word communication means being able to share ideas and talk openly with someone. Communication is an important part of your job as an Employee/Attendant. You and your Employer will have many occasions when you will need to communicate with each other clearly.

Communication begins with the job interview. Both you and the Employer will need to talk about his needs and expectations of you for this job. Think of your own needs, which might make a difference on the job, and be sure to state them clearly. For example, if you have another job, or you prefer not to work weekends, you must let the Employer know this during your first meeting. Sharing this and any other information in the first interview will prevent misunderstandings later.

Communicating With and About People with Disabilities

The Americans with Disabilities Act, other laws and the efforts of many disability organizations have made strides in improving accessibility in buildings, increasing access to education, opening employment opportunities and developing realistic portrayals of persons with disabilities in television programming and motion pictures. Where progress is still needed is in communication and interaction with people with disabilities. Individuals are sometimes concerned that they will say the wrong thing, so they say nothing at all—thus further segregating people with disabilities. When interacting with people with disabilities, etiquette is based primarily on respect and courtesy. Here are suggestions on how to relate to and communicate with and about people with disabilities.

Positive Words

Positive language empowers. When writing or speaking about people with disabilities, it is important to put the person first. Group designations such as "the blind," "the retarded" or "the disabled" are inappropriate because they do not reflect the individuality, equality or dignity of people with disabilities. Further, words like "normal person" imply that the person with a disability isn't normal, whereas "person without a disability" is descriptive but not negative. The accompanying chart shows examples of positive and negative phrases.

Affirmative Phrases	**Negative Phrases**
person with an intellectual, cognitive, developmental disability	retarded; mentally defective

person who is blind, person who is visually impaired	the blind
person with a disability	the disabled; handicapped
person who is deaf	the deaf; deaf and dumb
person who is hard of hearing	suffers a hearing loss
person who has multiple sclerosis	afflicted by MS
person with cerebral palsy	CP victim
person with epilepsy, person with seizure disorder	epileptic
person who uses a wheelchair	confined or restricted to a wheelchair
person who has muscular dystrophy	stricken by MD
person with a physical disability, physically disabled	crippled; lame; deformed
unable to speak, uses synthetic speech	dumb; mute
person with psychiatric disability	crazy; nuts
person who is successful, productive	has overcome his/her disability; is courageous (when it implies the person has courage because of having a disability)

General Tips for Communicating with People with Disabilities

- When introduced to a person with a disability, it is appropriate to offer to shake hands. People with limited hand use, or who wear an artificial limb can usually shake hands. (Shaking hands with the left hand is an acceptable greeting.)
- If you offer assistance, wait until the offer is accepted. Then listen to or ask for instructions.
- Treat adults as adults. Address people who have disabilities by their first names only when extending the same familiarity to all others.

- Relax. Don't be embarrassed if you happen to use common expressions such as "See you later," or "Did you hear about that?" that seem to relate to a person's disability.

- Don't be afraid to ask questions when you're unsure of what to do.

Communicating with Individuals Who are Blind or Visually Impaired

- Speak to the individual when you approach him or her.

- State clearly who you are; speak in a normal tone of voice.

- When conversing in a group, remember to identify yourself and the person to whom you are speaking.

- Never touch or distract a service dog without first asking the owner.

- Tell the individual when you are leaving.

- Do not attempt to lead the individual without first asking; allow the person to hold your arm and control her or his own movements.

- Be descriptive when giving directions; verbally give the person information that is visually obvious to individuals who can see. For example, if you are approaching steps, mention how many steps.

- If you are offering a seat, gently place the individual's hand on the back or arm of the chair so that the person can locate the seat.

Communicating with Individuals Who are Deaf or Hard of Hearing

- Gain the person's attention before starting a conversation (i.e., tap the person gently on the shoulder or arm).

- Look directly at the individual, face the light, speak clearly, in a normal tone of voice, and keep your hands away from your face. Use short, simple sentences. Avoid smoking or chewing gum.

- If the individual uses a sign language interpreter, speak directly to the person, not the interpreter.

- If you telephone an individual who is hard of hearing, let the phone ring longer than usual. Speak clearly and be prepared to repeat the reason for the call and who you are.

- If you do not have a Text Telephone (TTY), dial 711 to reach the national telecommunications relay service, which facilitates the call between you and an individual who uses a TTY.

Communicating with Individuals with Mobility Impairments

- If possible, put yourself at the wheelchair user's eye level.
- Do not lean on a wheelchair or any other assistive device.
- Never patronize people who use wheelchairs by patting them on the head or shoulder.
- Do not assume the individual wants to be pushed —ask first.
- Offer assistance if the individual appears to be having difficulty opening a door.
- If you telephone the individual, allow the phone to ring longer than usual to allow extra time for the person to reach the telephone.

Communicating with Individuals with Speech Impairments

- If you do not understand something the individual says, do not pretend that you do. Ask the individual to repeat what he or she said and then repeat it back.
- Be patient. Take as much time as necessary.
- Try to ask questions requiring only short answers or a nod of the head.
- Concentrate on what the individual is saying.
- Do not speak for the individual or attempt to finish her or his sentences.
- If you are having difficulty understanding the individual, consider writing as an alternative means of communicating, but first ask the individual if this is acceptable.

Communicating with Individuals with Cognitive Disabilities

- If you are in a public area with many distractions, consider moving to a quiet or private location.
- Be prepared to repeat what you say, orally or in writing.
- Offer assistance completing forms or understanding written instructions and provide extra time for decision-making. Wait for the individual to accept the offer of assistance; do not "over-assist" or be patronizing.

- Be patient, flexible and supportive. Take time to understand the individual and make sure the individual understands you.

Remember

- Relax.
- Treat the individual with dignity, respect and courtesy.
- Listen to the individual.
- Offer assistance but do not insist or be offended if your offer is not accepted.

Information for this section was obtained from the United States Department of Labor website June 2012 (http://www.dol.gov/odep/pubs/fact/comucate.htm), and from the Office of Disability Employment Policy; the Media Project, Research and Training Center on Independent Living, University of Kansas, Lawrence, KS; and the National Center for Access Unlimited, Chicago, IL.

Passive, Aggressive, and Assertive Communication

Here are three examples to show that some methods of communicating are better than others. When you have a problem to work out with your Employer, you will find clear communication will be the most helpful.

- **Situation**: You have been working for Joe for several months. You come in at 8:00 p.m. each evening and help him get ready for bed. Tonight he asks if you could come at 10:30 p.m. tomorrow evening. You usually plan to be home by 10:30 p.m., as you must get up early the next morning.
- **Passive Response**: You do not say anything and you come in at 10:30 p.m.
  - **Result**: You are upset because you know how tired you will be the next day. All the time you are helping Joe, you feel irritated. He asks if something is wrong and you say, "No."
- **Aggressive Response**: You say to Joe, "Don't you think I might be really tired if I come that late? Do you think I am your slave?"
  - **Result**: Joe gets angry. He says you are being rude and inconsiderate of his needs. The next time either the Employer (Joe) or you want to make a change to the schedule, neither of you will want to ask.

- **Best Response—Assertive**: Express your genuine concerns. "Joe, I would really like to help you out but it is difficult for me to stay up that late and then feel rested the next morning. Is there any other way we could figure out how to meet your needs?"
    - **Result**: You have been open and honest as to why this does not work for you, but you have shown Joe your concern for his needs and your willingness to try to figure out another way of working it out.

Planning Your Work

When working as an Employee/Attendant, remember you are working in your Employer's home. Look to her for training and direction in what you are to do for her. If you have problems, discuss it with your Employer in an attempt to find a workable solution for both of you together. If you are asked to do things that are not appropriate, and talking with your Employer does not change the situation, here are some suggestions of ways to handle the situation:

Giving Feedback

- Describe the situation as soon as possible after it occurs.
- Discuss only one incident at a time.
- Do not bring up things from the past. Stick to the present.
- Discuss the person's actions, not the person.
- Keep it brief and to the point.

Attitude for Self-Improvement

Learning how to do a task for someone else can be difficult. Each Employer is different. Some may be fussy about the way some tasks are accomplished, but others will be easygoing. Accept comments from your Employer about your work without feeling he is attacking you as a person. If your Employer says you did not do a task correctly, listen to him with the thought in mind of how you can do it better his way. Maybe there is something you need to do differently. Learning to take criticism is difficult. If you feel she is being overly critical of what you do, tell her how frustrating that is for you.

Remember, you are there to help this person live his life and do things the way he wants them done.

Personal Care

This section of the manual contains information on personal care such as transfers, bladder management, and nutrition. Each Employer will have a certain way of doing personal care. You should follow your Employer's directions. If he is not able to give directions, the following information will be helpful. When giving personal care, always protect the person's privacy, dignity, and modesty as much as you can. Please note that the following is a brief overview of personal care only. Although precautions such as handwashing and monitoring skin breakdowns will apply to nearly everyone, your Employer may have additional needs. It is important that you talk with your Employer or her primary caregiver to discover issues for which you must be on the lookout.

If you have never provided personal care activities for another person, you may feel a little uncomfortable at first. Think of this care as just another part of your job. Treat your Employer with respect and consideration while doing personal care just as you would while doing anything else. If you are being asked to do personal care activities that are beyond your comfort level, be sure to bring this up and discuss it with your Employer. You may become more comfortable once you have had a chance to discuss your feelings. You and your Employer should discuss what kinds of care the job will involve to be sure the job is right for you, before you finalize your employment agreement.

Universal Precautions

Universal precautions are intended to prevent exposure of healthcare workers to disease. Under universal precautions, blood and certain body fluids of all patients are considered potentially infectious.

Universal precautions apply to:

- Blood and other body fluids containing visible blood;
- Semen and vaginal secretions;
- Tissues; and
- Cerebrospinal fluid, synovial fluid, pleural fluid, peritoneal fluid, and amniotic fluid.

Universal precautions do ***not*** apply to:

- Feces
- Nasal secretions
- Sputum
- Sweat
- Tears
- Urine
- Vomit
- Saliva

Barrier protection should be used at all times to prevent skin and mucous membrane exposure to blood, body fluids containing visible blood, or other body fluids. Barrier protection should be used with all tissues.

Examples of protective barriers include gloves, gowns, masks, and protective eyewear. The type of barrier protection used should be appropriate for the type of procedures performed and the type of exposure anticipated.

- Gloves are to be worn when there is potential for hand or skin contact with blood, other potentially infectious materials, or items and surfaces contaminated with these materials.
- Wash hands or other skin surfaces thoroughly and immediately if contaminated with blood, body fluids containing visible blood, or other body fluids to which universal precautions apply.
- Wash hands immediately after gloves are removed.
- Change gloves between patient contacts.
- Do not wash or disinfect surgical or examination gloves for reuse.
- General purpose utility gloves (i.e., rubber household gloves) should be used for housekeeping chores involving potential blood contact. Utility gloves can be decontaminated and reused. Gloves should be disposed of it they are peeling, cracked, discolored, have holes, or tears.
- Avoid accidental injuries caused by needles, scalpel blades, laboratory instruments, etc., when performing procedures, cleaning instruments, handling sharp instruments, and disposing of used needles, pipettes, etc.
- Used needles, disposable syringes, scalpel blades, pipettes, and other sharp items are to be placed in puncture-resistant containers marked with a biohazard symbol for disposal.

Infection control is an important and ongoing concern for healthcare workers. By observing universal precautions, workers can protect themselves and others by preventing the transmission of disease.

Handwashing

Handwashing is easy to do and is one of the most effective ways to prevent the spread of many types of infection and illness in all settings—from your home and workplace to child care facilities and hospitals. Clean hands can stop germs from spreading from one person to another and throughout an entire community.

When should you wash your hands?

- Before, during, and after preparing food
- Before eating food

- Before and after caring for someone who is sick
- Before and after treating a cut or wound
- After using the toilet
- After changing diapers or cleaning up a person who has used the toilet
- Immediately after accidental contact with any body fluids
- After blowing your nose, coughing, or sneezing
- After touching an animal, animal feed, or animal waste
- After touching garbage
- After taking off your gloves

What is the right way to wash your hands?

- Wet your hands with clean running water (warm or cold) and apply soap.
- Rub your hands together to make a lather and scrub them well; be sure to scrub the backs of your hands, between your fingers, and under your nails.
- Continue rubbing your hands for at least 20 seconds. Need a timer? Hum the "Happy Birthday" song from beginning to end twice.
- Rinse your hands well under running water.
- Dry your hands using a clean towel or air dry.

Washing hands with soap and water is the best way to reduce the number of germs on them. If soap and water are not available, use an alcohol-based hand sanitizer that contains at least 60% alcohol. Alcohol-based hand sanitizers can quickly reduce the number of germs on hands in some situations, but sanitizers do **not** eliminate all types of germs. Remember though, that hand sanitizers are not effective when hands are visibly dirty.

How should you use hand sanitizer?

- Apply the product to the palm of one hand.
- Rub your hands together.
- Rub the product over all surfaces of your hands and fingers until your hands are dry.

For more information on handwashing, please visit CDC's Handwashing website. You can also call 1-800-CDC-INFO, or email cdcinfo@cdc.gov for answers to specific questions.

Nutrition

As an Employee, you may be asked to cook for your Employer. A basic knowledge of good nutrition is helpful in preparing good meals. Each food group has many choices so a good diet can be planned based on the kinds of food your Employer likes to eat.

When talking about nutrition, the word "diet" is often used. A diet can mean the food one eats in general, as in "eating a healthy diet." Diet can also mean a special diet, such as "low salt diet," or "weight loss diet." You will find out what kind of diet your Employer follows. If it is a special diet, you must learn what foods she can and cannot eat. Your Employer's physician may direct a specific type of diet.

Skin Care

Keep your Employer's skin healthy:

- Wash and dry skin immediately if it gets dirty. Sweat, dirt, and stool can carry germs and cause irritation to the skin.
- A shower, bath, or sponge bath should be taken at least every other day. Be sure to rinse well to remove all soap.
- If a complete bath is not possible, be sure to wash and dry the groin area well. If skin irritation in the groin area is a problem, more air to the area will usually help.
- Avoid using rubbing alcohol on the skin because it dries the skin.
- Use powder only in very small amounts. Be sure to spread the powder out smoothly across the skin.

First Aid for Skin

Small Cuts – Wash with soap and water. Apply a Band-Aid® or bandage to keep it clean. Talk to your Employer and suggest that he call a physician or clinic nurse if you notice any areas of bruising, cuts, or skin problems of any kind.

Burns – For a serious burn, call 911 immediately. For a minor burn, quickly run the burned area under cool water (not cold) for 15 minutes.

- Do not put anything else on the burn.
- Do not open blisters.
- Have the burn seen by a doctor. Burns can be very serious if not treated properly.

Nutrition and Fluids for the Skin

A healthy diet with a variety of foods is important for healthy skin. The skin needs enough fluids to keep it from getting too dry. At least 6-8 glasses of liquid each day will help, but make sure your Employer is allowed to have this much fluid on a daily basis. Water is best. You may add ice cubes if that makes it more appealing to your Employer.

Pressure Sores

A pressure sore can form on the skin when too much pressure cuts off the area's blood supply. Without blood, the skin dies and causes a sore to open up. Pressure sores take a very long to get better and can cause serious medical problems. Prevention of pressure sores is very important.

Pressure sores start as red or white areas that do not go away. If the skin does not go back to its normal color after 20 minutes off the area, a pressure sore is beginning. Your Employer should stay off that area and call a doctor. Pressure sores most often start over bony areas because the bone is right under the skin and can cause even more pressure.

Warning Signs

Watch for ANY of the following changes and report them immediately to your Employer's doctor or home health care provider:

- Redness
- Whiteness
- Broken skin
- Blisters
- Warmth
- Rashes

Ways to Prevent Pressure Sores

- A person who has difficulty walking or is unable to walk, may sit in a chair or wheelchair much of the day. They may need to have help in changing their position frequently enough to prevent pressure sores. Check with your Employer, or his family caregiver to determine how often this must be done, and then keep track of the time and remind the person when it is time to reposition.

- Always inspect the skin when you are bathing or changing the person's clothing. Look closely at the following areas:
    - Areas of the skin where there have been pressure sores in the past;
    - Over bony areas such as the hip bones;
    - In the groin area;
    - Feet, including the heels and between the toes; and
    - Under splints and braces.

Bladder Management

As people age, they frequently are not able to hold their urine, which is called incontinence. She may need to be on a schedule of frequent toileting, or wear incontinence pads. Sometimes illness or injury blocks or changes the message the brain receives from the bladder and the person may not realize he needs to urinate, or might not be able to wait until he gets to the bathroom.

When helping someone with bladder care, think about the following:

- How much help does she require to get on or off the toilet?
- How often does he usually need to use the toilet?
- Sometimes people will drink less just so they do not have to use the bathroom as often—not a healthy practice! Encourage your Employer to drink as much as he needs because you are there to help him use the bathroom as often as needed.
- Are incontinence pads, Attends®, or Chux® underpads being used?
- Does he use an external condom catheter (or "external")? This is a latex catheter used by men that fits over their penis and drains to a collection bag. The external should not be taped too tightly to the skin or left on too long, because skin breakdown can occur. Be sure someone checks it on at least a weekly basis.
- Is a catheter being used? A catheter is a small tube placed in the bladder to empty out the urine. A catheter can be used in two ways: It can be placed in the bladder, the urine drained out and the catheter removed. Or, the catheter can be inserted into the bladder and stay in place with a tiny balloon on the end that holds it inside the bladder.

Special care must be given to a catheter that stays in place:

- Use soap and water every day to wash the skin around the catheter.
- Keep the drainage bag lower than the person's bladder.
- Make sure there are no kinks in the tubing.
- Follow instructions for keeping the drainage bags rinsed and clean.
- Position the catheter so there is some slack; it should not be "pulling."

Good habits for anyone to help keep the bladder healthy:

- Drink plenty of fluids—preferably water—at least six glasses a day.
- Keep the groin area clean to prevent infection.
- Women should always wipe the groin area from front to back to keep bacteria from the bowel from getting into the urinary opening.

- Drink more liquids and call your doctor if the urine is dark, cloudy, or smells bad.
- Suggest your Employer call his doctor if he is experiencing chills or fever, or blood in the urine.

Bowel Management

Sometimes injury, illness, or aging causes a person to have difficulty with normal bowel movements. Someone might not know when a bowel movement is needed, or they may not be able to hold it long enough to make it to the bathroom, or they may have problems with constipation.

As an Employee/Attendant, you might be asked to help your Employer follow a routine called a bowel program. A bowel program may mean reminding the person to use the toilet at the same time every day. Your Employer can tell you how to help with the bowel program. Each letter in the word SELF will help you remember the important ideas about keeping the bowels working right.

S **S**chedule

E **E**xercise helps the bowels work better. Help your Employer exercise as much as they can.

L **L**iquids – Drink 6-8 glasses of liquid each day. Encourage frequent sips of water, warm or cold, whichever is preferred.

F **F**ood with fiber (fruits, vegetables, grains) helps the bowels work better, too. A bowl of whole-grain cereal every day also can help.

Being very clean is important. Wash with soap and water and dry your Employer's skin well after a bowel program or accident.

Common bowel problems:

Constipation means a hard bowel movement or no bowel movement for several days. The stomach may be swollen. The person may not feel like eating.

Possible Causes:

- Not drinking enough liquids
- Not following a bowel program
- Not enough physical activity
- Change in medication, or taking too many pain medications

If these ideas do not help, a doctor's advice may be necessary.

Diarrhea or loose, watery stools.

Possible Causes:

- Change in medication, especially antibiotics
- Poor diet, too much fruit or fiber in the diet
- Flu or stomach virus
- Stress or emotional problems

Possible Solutions:

- Drink more fluids to replace fluids lost
- Eat bland foods like rice, crackers, or clear soups
- If not better after two days, call the doctor

Transfers

A transfer means to help a person move from one place to another, such as a bed to wheelchair.

You must *not* completely lift your Employer or use a mechanical lift unless authorized by a physician and you are appropriately trained.

- Everyone must work together so the transfer is smooth and safe. Everyone transfers differently, so ask your Employer what works best for him. Ask him:
  - Can you stand? Do you need help from me to stand? What kind of help do I need to give you?
  - How have you done transfers in the past?
  - Where is it safe for me to hold onto you—a helpful place to hold that does not cause you pain?
- Do not start the transfer until everyone is ready. Be sure everything is in place so the person can be moved safely and comfortably.
- If your Employer is in a wheelchair, place it next to the transferring surface. Remove the wheelchair parts that may be in the way, such as removable armrests and footrests. Make sure the wheelchair is locked.
- Ask the person to move close to the edge of the bed or chair, but not close enough to slip off.

- Your Employer’s feet should be about 12 inches apart. This will give a wide base of support and help put weight on both feet. If you are assisting him to stand, you should have a wide stance yourself with one foot between your Employer’s feet, and have your knees bent and a straight back, to stabilize your own weight.
- Make the transfer quickly and smoothly but do not rush.
- When lowering your Employer to a sitting position, bend at the knees and lower yourself along with him, keeping your back as straight as possible.
- Know your limits and do not try to do more than you can.
- Always remember safety and good body mechanics.
- Talk about the transfer afterwards to see if anything should be done differently the next time.

Back injuries can be a frequent occurrence. Be aware of this and consult with someone about good body mechanics.

Emergency Response

As an Employee, you may need to react to certain kinds of emergencies involving your Employer. Talk with him about what to do in an emergency. Many areas use 911 for emergency calls, but there are some areas that do not. Be sure you know how to get emergency help in the area where you are working.

Employers may have a Personal Emergency Response System (PERS). A small radio battery-powered transmitter is carried or worn on a chain around the neck or wrist by the user. When emergency help is needed—medical, fire, or police—the PERS user can press the transmitter’s “help” button to automatically dial emergency numbers. The caller is identified, and the response center determines the nature of the emergency, review the caller’s medical history, and notify appropriate medical professionals. Most transmitters are waterproof and can be worn in the shower.

Ask your Employer which person you should call for any situation. He may want you to call certain people first. Talk about this before there is a crisis so you can be ready to call the right people.

At the end of this section is a list of important phone numbers. Talk with your Employer and fill it out together. Always remember, if you are in doubt about getting help, call someone on the phone list and tell him what is happening.

Adult Protective Services (APS)

All persons are required by law to report all cases of suspected Abuse, Neglect, or Exploitation to either the nearest APS office or to Law Enforcement.

If you suspect that your Employer is being abused, neglected (including self-neglect), or exploited by another person, you have a responsibility to report it. Contact the Adult Protective Services (APS) State Hotline at 1-800-992-6978 to report abuse or neglect.

> **Abuse:** Any touching (battery) of a person in a rude and insolent manner. Verbally abusing an individual is also a punishable offense.
>
> **Neglect:** The intentional withholding of essential care or service. Abandonment of an individual is also considered neglect.
>
> **Exploitation:** The intentional misuse of a person's property, person or services for financial gain.

Personal care services under Indiana’s Consumer-Directed Attendant Care Program do not permit health care or medical care. The foregoing information is not to be interpreted as permitting any service not in the Employer’s service plan for attendant care services.

Emergency Information

Important Phone Numbers

Here is a handy guide to help you maintain important information about your Employer in case of emergencies. Post this in a visible and easy-to-find spot and make sure everyone knows where it is.

IMPORTANT INFORMATION AND PHONE NUMBERS	
Address where you are:	
Landline phone number:	
Cell phone number:	
Fire Department	
Police:	
Doctor:	
Hospital:	
Public Transportation:	
Pharmacy:	
PERSONAL	
Family:	
Friend:	
Neighbor:	
Other Employees:	
Case Manager’s Name and Phone Number:	